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Live 3.3-Hour December 3, 2007 Presentation

STEVEN G. SIEGEL

# INTRODUCTION TO ESTATE PLANNING

## Why YOU Should Purchase

Are you interested in *providing estate planning advice* to your existing clients or *trying to develop an estate planning practice*? If so, you will want to listen to this program. This 3.3-hour December 3, 2007 presentation by Steven G. Siegel is intended for attorneys who would like to begin to offer estate planning services. It covers the relevant Federal, but not state, laws.

Mr. Siegel, President of The Siegel Group, a national consulting firm based in Morristown, NJ:

- ▶ **explains** the relevant Federal law
- ▶ **provides** warnings and tips
- ▶ **recommends** helpful planning strategies

This detailed “**how-to**” practitioner-oriented program gives you the *knowledge you need* to properly advise your clients.

STEVEN G. SIEGEL is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of several books, including *The Estate Planning Course Book*. Mr. Siegel is a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

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## COMPLETE TABLE OF CONTENTS

To see the complete **Table of Contents** for this course book, or that of any other Estates, Gifts, Trusts or Tax topic we offer, go to [www.nlfcl.com](http://www.nlfcl.com) and click on the **Estates, Gifts, Trusts & Tax Materials** link on the home page. Click on the blue **Table of Contents** link under the title of the topic you wish to review. To return to the **Estate, Gifts, Trusts and Tax Materials** main page, click the “Back” key on your browser.

## TOPICS

- ✓ **What Is An Estate Plan?**
- ✓ **Getting Started: The Questionnaire And Interview**
- ✓ **Elements Contained (Or To Be Considered) In Every Will**
- ✓ **Using Trusts In Estate Planning**
  - basic elements
  - living trusts
  - testamentary trusts
  - special situation trusts
- ✓ **How Does The Federal Estate Tax System Work?**
  - property included in the gross estate
  - deductions from the gross estate
  - credits against the estate tax
- ✓ **Addressing The Types Of Property Interests Likely To Be Owned By A Client**
  - joint property
  - life insurance policies
  - retirement plan benefits
  - handling owners of a business
- ✓ **Basic Tax Issues To Consider In Developing An Estate Plan**
  - unlimited marital deduction
  - unified credit bypass trusts
  - basic lifetime gifting strategies
- ✓ **Elementary Documents To Address With Every Client**
  - last will and testament
  - living trust
  - durable power of attorney
  - living will and health care proxy
- ✓ **BONUS: The course book includes 7 Sample FORMS!**
  - **Short-Form Client Questionnaire - 1 page**
  - **Long-Form Client Questionnaire - 7 pages**
  - **Simple Will - 13 pages**
  - **Living Trust - 15 pages**
  - **Pour-Over Will - 5 pages**
  - **Durable Power of Attorney - 9 pages**
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- ✓ **125 Pages**
- ✓ **Useful, Practical Explanation**
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  - **What Is an Estate Plan?**
  - **Getting Started: The Questionnaire and Interview**
  - **Elements Contained in (or To Be Considered in) Every Will**
  - **Using Trusts in Estate Planning**
  - **How Does the Federal Estate Tax System Work?**
  - **Addressing the Types of Property Interests Likely to be Owned by a Client**
  - **Basic Tax Issues To Consider in Developing an Estate Plan**
  - **Elementary Documents To Address with Every Client**
- ✓ **Appendix: 7 Sample FORMS!**
  - **Short-Form Client Questionnaire - 1 page**
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• December 3, 2007 • 3.3 Hours •

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